



## *April 2023 Retiree Newsletter*

### **Employees' Retirement System Of The City of Milwaukee**

789 North Water Street, Suite 300, Milwaukee, WI 53202

(414) 286-3557 or (800) 815-8418

Visit Our Website: [www.cmers.com](http://www.cmers.com)

Questions or comments: e-mail [norm@cmers.com](mailto:norm@cmers.com)

### **Reminder**

ERS does not take the following changes over the phone: **address, banking information, beneficiary changes or tax withholding elections.** This policy is to protect our retirees from fraud and/or identity theft.

If you need to make any changes, you can visit [www.cmers.com](http://www.cmers.com), click on the green "Forms" button, and then click on the form you want to print. Once you have completed the form, send it to the ERS address listed at the top of the form. If you do not have online access, please call our office and ask to have the form you need sent to you.

**The post office will not forward your pension check or direct deposit notification to a new address, even if you have completed a change of address form with the post office.** You must notify ERS of any permanent or temporary address changes. If ERS does not have your correct address, the post office will return your check or direct deposit notification to our office. In addition, if you are having your mail temporarily held at the post office, your check or direct deposit notification will be returned to our office.

### **Tax Withholding**

If you have completed your tax filing for 2022 and discovered that you owe too much or are getting a refund that is bigger than it needs to be, you may want to adjust the amount withheld from your pension payment. Withholding forms can be obtained by calling our office or by visiting the ERS website [www.cmers.com](http://www.cmers.com). On the website, click on the "Forms" button, and then click on the form you want to print. Go to the second page, print the withholding form, complete it, and send to the address listed on the top of the first page. If you are unsure how much you should have withheld, please consult a tax professional. The ERS staff are not allowed to give tax advice.

### **2022 Tax Filing**

If you need a replacement 1099-R tax statement for 2022 (or any earlier year), please contact the ERS office. Replacement forms for 2022 were issued, free of charge, through **April 18, 2023**. After that date all requests for replacement forms for 2022 and previous years will be filled only upon receipt of a \$15.00 processing fee per form. You will need to submit a check payable to the **Employees' Retirement System** and a note with your name, mailing address, social security number or payee ID number, and the year(s) for which you will need a replacement.

### **Investment Update**

As of February 28, 2023, the fund value was \$5.62 Billion, and the year-to-date return was 2.3%, gross of fees.

## May 2023 Pension Payments

- Payments will be **mailed May 30<sup>th</sup>** and **payable May 31<sup>st</sup>**.
- Direct deposits will be posted to your account on **May 31<sup>st</sup>**.
- Processing affidavits for lost April checks will start **May 10<sup>th</sup>**.

## Other Dates of Note

- Cinco de Mayo – May 5<sup>th</sup>
  - Mother's Day – May 14<sup>th</sup>
  - Armed Forces Day – May 20<sup>th</sup>
  - Memorial Day – May 29<sup>th</sup>
- ERS OFFICE CLOSED

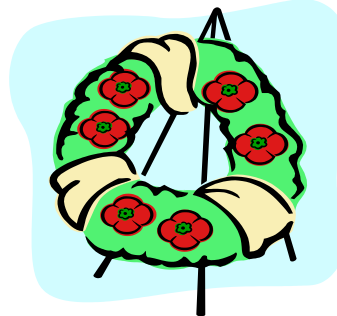
### Recently Retired ERS Members

Christopher Carter- MPD\*  
Keith Carter- MPS\*  
Diane Cohen- MPS\*  
Eli Cole- MPD  
Monique Foster- MPD  
Ronald Harper- DPW - Operations  
Ronald Heberlein- MPS  
Steven Jacquart- MMSD  
Regina Jagers- Health  
Cindy Johnson- MPS  
Lawanda Leflore- MPS  
Daniel Lopez- DPW - Fleet  
Donald Mac Kenzie- MFD  
Aaron Malvick- MPD  
Richard Matiszik- MFD  
David Melbye- MMSD\*  
Janet Olsen- Health\*  
Wallace Owens- DPW - Water  
Brian Pellett- DCD  
Angela Phillips- MPD\*  
Rebecca Rabatin- DOA  
Richard Riley- MPD  
Frank Robinson- Health\*  
Joel Rodriguez- MFD  
Claribel Rodriguez- MPS  
Dean Schumacher- MFD  
Douglas Slotke- DPW - Water  
Ann Smith- Library\*  
Barbara Teipner Wargolet- ERS  
Brian Vila- MPS  
Willie Wade- MPS\*  
Nancy Zach- MMSD\*  
Kevin Zebro- MPD\*  
Virginia Zerpa- Health\*

\*Deferred

### In Memoriam

*ERS Retirees who have recently died:*



Christopher Allen-MPD  
Carol Bauer-MPS  
Harold Baumgartner-Municipal Equipment  
Angelo Bertoni-MFD  
David Bonar-MFD  
Hal Boston-MFD  
Carol Budish-MPD  
Louise Clinton-MPS  
Connie Cole-MPS  
Priscilla Fraser-MPS  
Edward Heidenreich-MPD  
Albert Hentz-MPD  
Denise Holloway-Common Council  
Clarence Ingram-MPS  
Mark Krause-MPD  
Alice Liebmann-MPS  
John Martin-DPW - Infrastructure  
Juanita Matias-MPS  
Arthur Molter-Bridges & Public Buildings  
Jose Paniagua-MPS  
Karen Pierce-Health  
Earnest Ray-DPW - Fleet  
Charles Rewolinski-MMSD  
Claribel Rodriguez-MPS  
Donald Schriefer-City Attorney  
Brenda Strong Windom-MPS  
Dennis Thierbach-MPD  
Rocky Todd-MPD  
Robert Weber-MPD

